



2017 Review of STRATEGIC PLAN 2015-2020

*Leading, supporting, and Inspiring local action to restore
and protect the lands, rivers and streams of the Chesapeake Bay watershed.*

At the April 2017 Board Meeting in VA, the Board and Staff participated in a review and discussion of our current Strategic Plan. All agreed that the mission, values, goals, objectives, and overall content of the action plan remained timely and valid. In addition, some new strategic objectives may need to be developed. While the existing assessment of threats and opportunities remains useful, it was noted that new issues and opportunities could be incorporated, such as threats to federal funding. A more detailed review of progress on the strategic action plan (Appendix A) further demonstrated that the plan continues to serve as a blueprint for future work and a guide for future initiatives. The Board identified a need to continue to evaluate Alliance programs over time and to work with the new Executive Director to conduct a more complete review and refinement of the Strategic Plan and a potential revision of the Action Plan by the end of the calendar year.

The following are the notes from the general discussion and four Board/staff breakout groups.

Goal # 1 Expand and cultivate signature programs that support the Alliance mission.

The Alliance has been strategically focused on the actions in the Plan. Significant progress has been made on all Signature Programs identified with the exception of Sojourns, although discussions regarding this effort are underway.

In particular, there has been significant enhancement of the following program areas:

- Businesses for the Bay
- Project Clean Stream
- River Wise Communities
- Chesapeake Forests
- Watershed Forum and ForumPlus

A full understanding of how the Alliance will continue to build these efforts will require the identification of additional strategic actions. The concept of “fee for service” as a future revenue source was identified. The groundwork has also been laid to capitalize on additional opportunities to enhance our work in:

- Assisting Local Governments
- Citizen Science-Volunteer Monitoring

Project Clean Stream. Some programs have grown significantly, however, still struggle with a business model that will sustain support and progress. A good example of this is Project Clean Stream, a big focus of the Alliance and a program with some of our greatest opportunity for high visibility and building stewardship. PCS has grown exponentially in terms of participation but not in terms of corporate or other sponsorship. In addition, the old business model (built for supporting 5000 volunteers may not be the right one for supporting 70,000 volunteers.

There are some strategic questions for PCS program growth. How should we increase awareness, visibility, and collaboration while assessing and maybe changing the assistance we provide; Is there a maximum number of people, how do we reach out to more businesses, schools, etc. ? How should the Alliance improve its approach? How can the Alliance balance visibility and branding with local support and recognition? Focus on creating network nodes (relationships) to support program. Adjust implementation to community sizes and locations, create better synergy with local governments, and increase the use of social media marketing.

Chesapeake Forests was discussed and the success of this program in expanding its work and reach was commended but better integration with other program areas is desirable. The program has the potential to engage many people through tree planting and restoration projects and partnerships. Some highlights of current program review included:

- Growth in agriculture-related efforts
- Staff Capacity needs and new PA staff growth
- Developing new tools to function with CREP
- Setting a goal for number of trees in ground and developing a “Tree Challenge”
- Engaging more local governments and communities and private land owners

These examples pointed out a number of more common elements related to scaling up impact and achieving program goals. Overall there is a feeling that Alliance programs are accomplishing a great deal but that they suffer from a **lack of marketing and visibility** as well as identity (for the Alliance) thus complicating our quest for sustainable funding. Discussed enhancing the role of the **Programs Committee** in terms of strategic guidance and assessment, and measuring success as well as scheduling meetings with staff to assess specific Alliance programs and help identify strategies for growth and refinement.

Goal #2: Ensure the Alliance is an effective, creative, and supportive organization.

The **Alliance organization has grown** substantially in the first few years of the plan increasing staff by 25-30%. A young staff has some challenges in terms of education regarding the mission and how an NGO operates. **Young staff** also have desires to create a positive and supportive workplace. The major accomplishment in this area has been successful efforts to better define employee benefits and to create opportunities for **health and retirement** options. Continually expanding and improving these benefits is essential to retention and recruitment. As the Alliance’s **financial position** improves so to can benefit programs. The Innovation Fund was also mentioned as one sign of recognition of the need to foster creativity within the organization and the efforts to better engage and strengthen the Management Team through meetings, conference calls, and retreats was noted.

In terms further efforts to build a more effective organization, the following were briefly identified:

- Continued expansion of administrative and development funding support for Directors and Staff
- Increased opportunity for leadership and other forms of developmental training for staff
- Fostering greater inter-office and inter-program collaboration
- Better understanding of all Alliance mission areas and programs among the staff (internal education and cross-training)

Likewise, our **Board has grown** in size and diversity and many long-time Board members who carried the Alliance through harder financial times have been replaced by new members without this memory and a more objective viewpoint with a look to the future. We have done a better job of **recruitment and training of Board Members** yet our geographic and professional diversity remain a challenges to strong Board operations. Efforts to strengthen **Board Committees** and the Executive committee are underway. Growing interaction between the Board Committees and Board staff board interaction.

Diversity (cultural) remains a challenge both within the organization and the representation of the Board. The recent adoption of a policy for inclusion and the identification of a variety of steps to address this issue are positive. The Strategic Plan need to be revised to include a specific statement and objective toward this goal as well as language edited in various placed to strengthen this intent. Specific actions need to be identified related to recruitment, internal and external communications, and financial and human resource support.

The Alliance has made significant progress in **better communications and branding** of its mission and programs but more work in targeted outreach and communications strategy is needed to achieve our goals for visibility within the Bay community. Our branding has really solidified but we are not quite finished with fostering a clear understanding among staff and the public in terms of our mission and work. We have hired communications staff which has dramatically raised this profile. The completion of video and visual products for the Taste, a high quality and timely newsletter, and new website were noted. **Communications needs** discussed included:

- Communication planning to identify new and best ways to improve branding and messaging (such a targeted social media, events, etc.)
- New tools and materials to communicate (brochure, fact sheets, short video messages, etc.)
- Taking advantage of resource tools like web-based stormwater and native plant sites and the watershed network
- Increased use of events
- Volunteers and staffing

Goal #3 Grow Alliance membership and expand development activities.

This discussion began with an identification of the **changing environment** within which these activities are being carried out. Some of these should be updated in the challenges and opportunities section. Since the plan was written (accelerating more recently):

- Federal Government is reducing regulations (such as waters in the US)
- There are many political changes that warrant a nimble and non-polarized organization
- New attention on private sector [targeted] partnerships (as public money may decrease)
- There is an increasing trend back toward advocacy (since the election)

The focus within the Plan on continuing to diversify **sources of funding** and build a stronger private (unrestricted) development effort remains valid as well as representing a critical priority. The need to continue existing progress in communications and develop targeted messaging that is simple and powerful to support development efforts was identified.

Membership/Development

The need to **discern the role of membership** within the Alliance remains a strategic priority. What does “membership” mean compared to just a supporter? Is it outdated? Should membership remain as a focus area of our development program? Both membership and overall development continue to be limited by the scope of our contact database.

Needs

- Building expanded lists with a clear event/tables strategy with sign-in sheets at all events
- Increasing our visibility at big events
 - More promotional materials
 - Use of banners, advertising, logo materials
- Must develop means to institutionalize within the organization the habit of collecting and sending participant names from events along with photos/info for our database and communications tools like the newsletter
- Build relationships with chambers of commerce and target business contact access
- Build cadre of trained volunteers for “tables” at events
 - Follow through on the service enterprise initiative
- Rather than focus on a new membership drive, increase numbers by encouraging current member outreach to others
 - Provide benefits like getting a tote bag or other reward
- Our focus has been on supporters that believe in the mission and not need to a gift to join

Although since the plan was developed we have hired full-time and part-time development staff as well as communications support there is still a need to further increase support. Strategic actions such as:

- Strengthen and refine simple messages about what the Alliance does and what the supporters are supporting
- Develop a communications plan and needed materials and tools
- Better integrate and define roles for staff and State Directors in development functions. Perhaps set budgets and goals.
- On staff calls have a designated person in each office to highlight points for Alliance communications, social media, newsletter, etc

Goal #4: Achieve excellence and sustainability in financial management and expand fundraising to support Alliance programs.

Since the adoption of the plan, the Alliance has made **significant progress** within this goal area. We have revamped and revitalized financial systems increased grant revenues, increased net receipts from the Taste, and eliminated a 10 year unrestricted net asset deficit. We have structured and trained a strong financial and human resources team. The Alliance has made progress in diversified

funding by increasing corporate, local government and foundation support while retaining federal grant funds. However, during this time period general donations and unrestricted fundraising have remained fairly level and in terms of total revenues, remain at 5-10% of organizational income. We have for the first time in recent memory developed a comprehensive **development strategy**.

Moving forward, strategic plan attention should continue to focus on ways to maintain strong grants management and financial systems and better document and train its staff in business procedures. The Alliance will need to hold onto gains in program grants while setting and achieving goals for increased fundraising and development activities that achieve a greater balance between unrestricted and restricted funding.

Financial Areas of progress in first half of the plan:

- Better indirect cost recovery and grant closeout and accounting. Continue to evaluate salary and fringe vs total modified direct costs options as grant mix changes.
- Better grant planning to ensure organizational health.
- Growth in salary and compensation
- Accurate up to date knowledge of grant status by Staff

Objectives that have not been met and need action focus:

- Build an unrestricted net asset annual balance of at least \$500,000.
- Diversify and pursue grant applications to foundations, local governments, states, and businesses in order to maintain a non-federal funding percentage at less than 50%.
- Create a funding base that can allow the Alliance to provide strong support to partners

Future needs include:

- Strategies for recruiting and integrating additional corporate and program sponsorships - PCS and B4B
- Improve management team and staff roles in financial management and fundraising
- Improve organization benefits and career development
- Continue to refine the Financial/Administrative Team approach – assess training needs
- Complete and be recognized for NGO rating – Charity Navigator, 1% for the Planet,

Fundraising remains the critical area of focus. In first half of executing the plan, we have made significant progress in understanding and **better planning** for our current fundraising efforts and where they can be refined. Now we will need to begin aggressively implementing **new ideas** and ways to build on current work. Our development plan represents a start but there is a way to go yet to implement it and to develop major gifts. Additional efforts to cultivate and recognize sponsors and major donors is important. The **Taste remains** our primary fundraising effort. Social marketing, program opportunities, and new events are strategies for increasing visibility. We have begun discussions of planned giving and are on track to begin to pilot in 2018.

Fundraising Objectives that have not been met and will need a major action focus:

- Strengthen and expand the number and effectiveness of annual fundraising events.
- Pilot new and innovative fund raising initiatives.
- Increase the total annual unrestricted income to 20% of the annual operating budget.
- Launch a major gifts campaign by 2020.